PLANNING DIVISION

South Pacific Division
USACE

INTRODUCTION

SAN FRANCISCO DISTRICT SUPPORT TEAM

- Established 24 Mar 00
- Mission: to help District & PDT's
- Who:
  - George Domurat [CO]
  - Mary Gillespie [OC]
  - Richard Guthrie[RE]
  - Ed Sing [Engr]
  - Les Tong [Pln]
  - Jim Ueda [PM]

South Pacific Division

PLANNING

South Pacific Division
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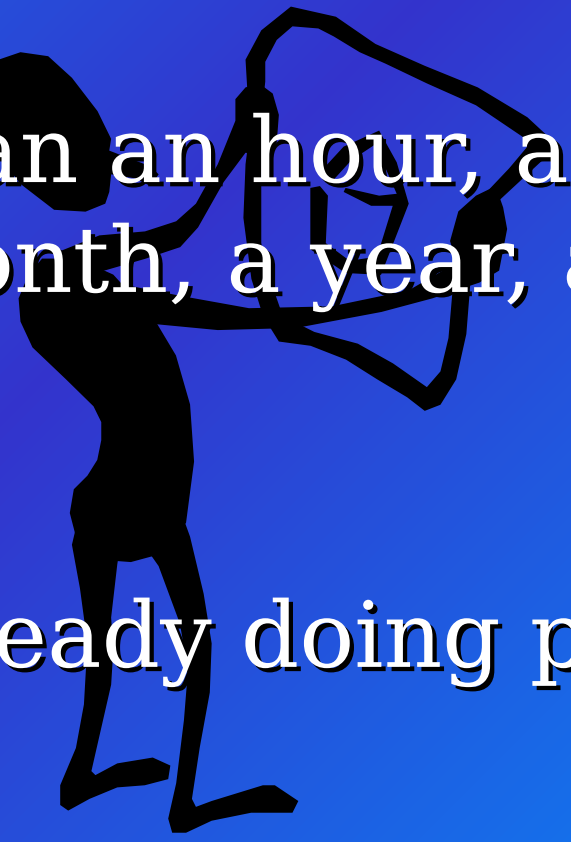
Feasibility Phase
Overview

San Francisco District Training Series

Topics

- Role & Teamwork
- Process
- Feasibility phase
- Feasibility Milestones
- Challenges
- Quality Management

Your Role in the Planning Process



- You can plan an hour, a day, a week, a month, a year, a decade….
- You are already doing planning

Your Role in the Planning Process

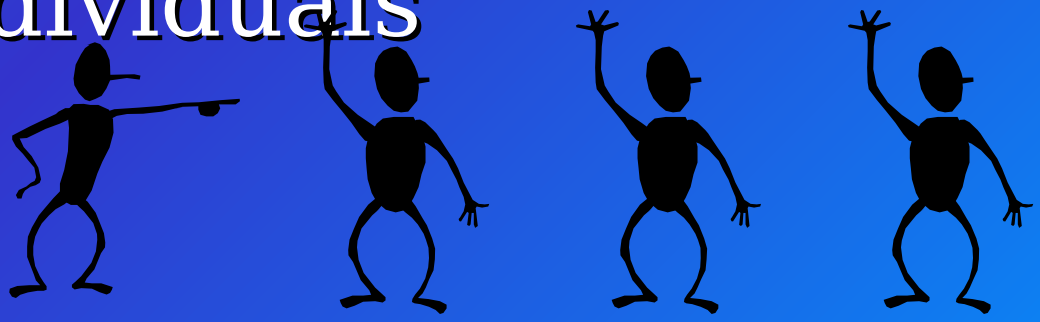
- You are a member of the **study team**

- As a member of the study team, you need to understand the **planning process**

A Planning Model

- There is a planning process
  - a set of steps

- Teams do better than individuals



A Planning Model

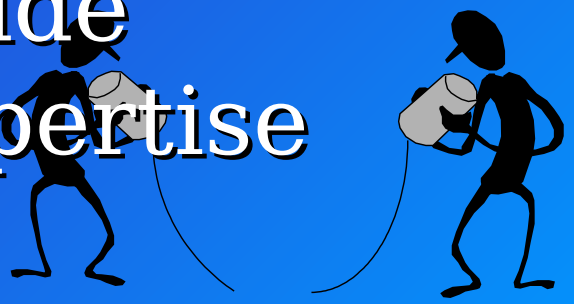
- What is the problem?
- How can it be solved?
- What are the advantages and disadvantages of solutions?
- What is the best solution?
- Feedback

Team Types

- TEAM IN NAME ONLY
- DEVELOPING TEAM
- HIGH PERFORMING TEAM

~~Team in Name Only~~

- Essentially a group of functionally oriented individuals
- Identified as being affiliated with a particular project
- No contribution outside functional area of expertise

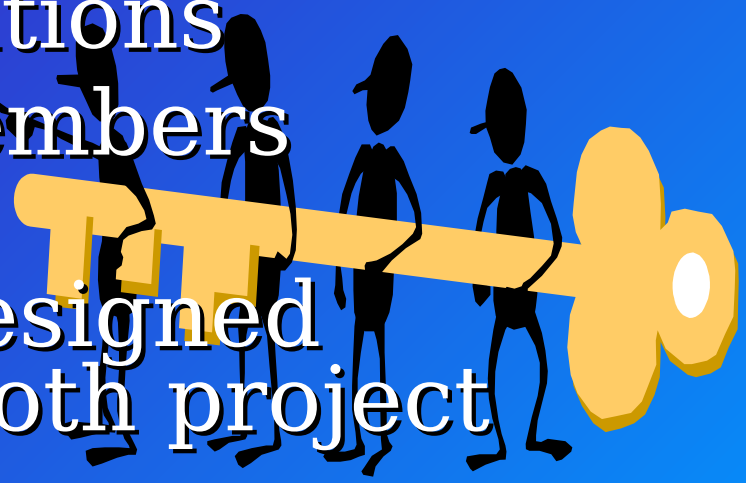


Developing Team

- Participants associated themselves with the project
- Recognition of PM as the team facilitator
- Struggling with balancing team responsibilities with functional obligations

High Performing Team

- Ability to work together
- Clearly focused on project success; able to balance team and functional obligations
- Empowered team members provide leadership
- Follow procedures designed to accommodate both project and functional responsibilities



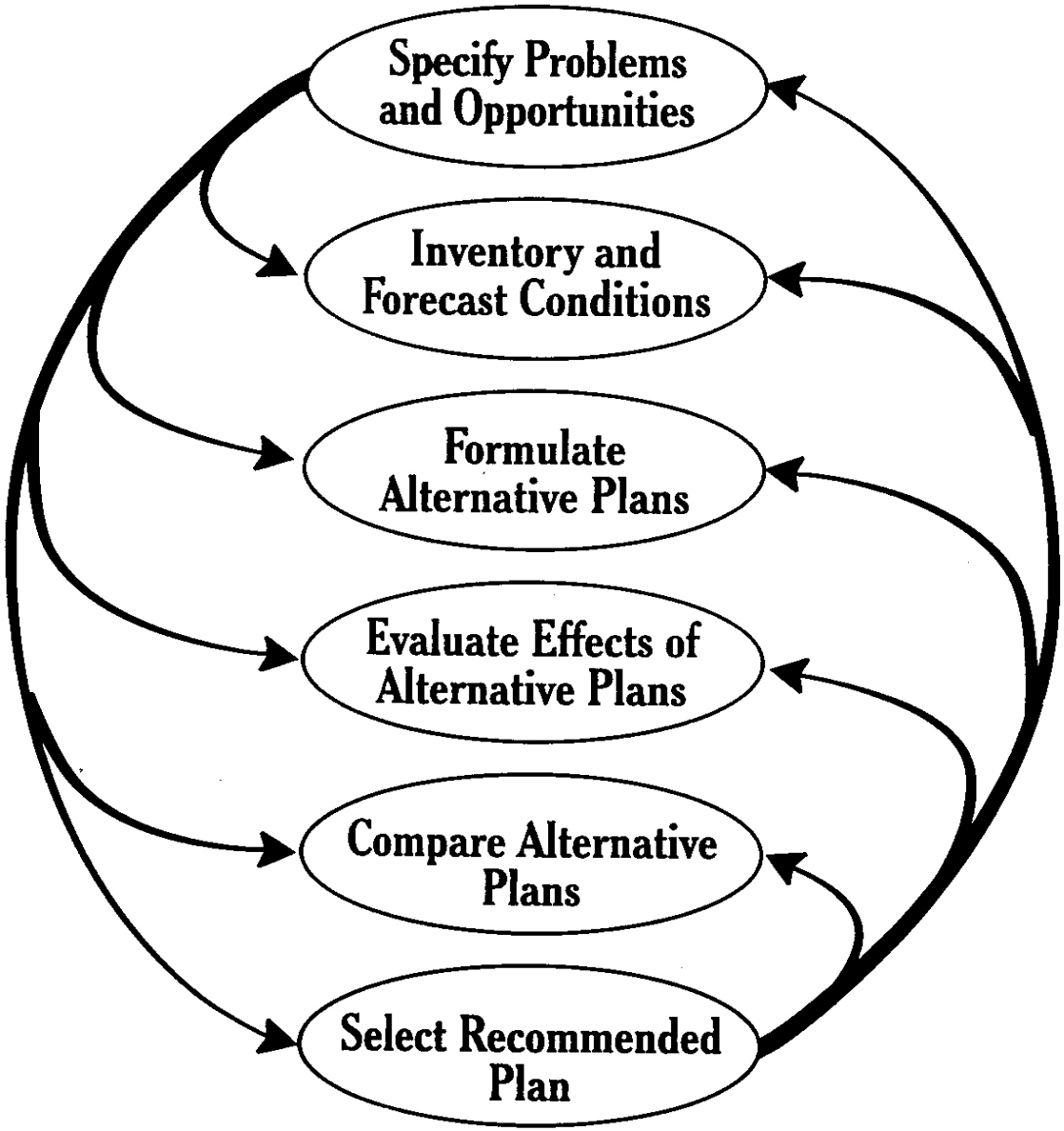
Just a Question

On which of the three team types would you want to participate?

P&G Planning Steps

- Specify Problems and Opportunities
- Inventory and Forecast Conditions
- Formulate Alternative Plans
- Evaluate Effects of Alternative Plans
- Compare Alternative Plans
- Select Recommended Plan

PLANNING PROCESS

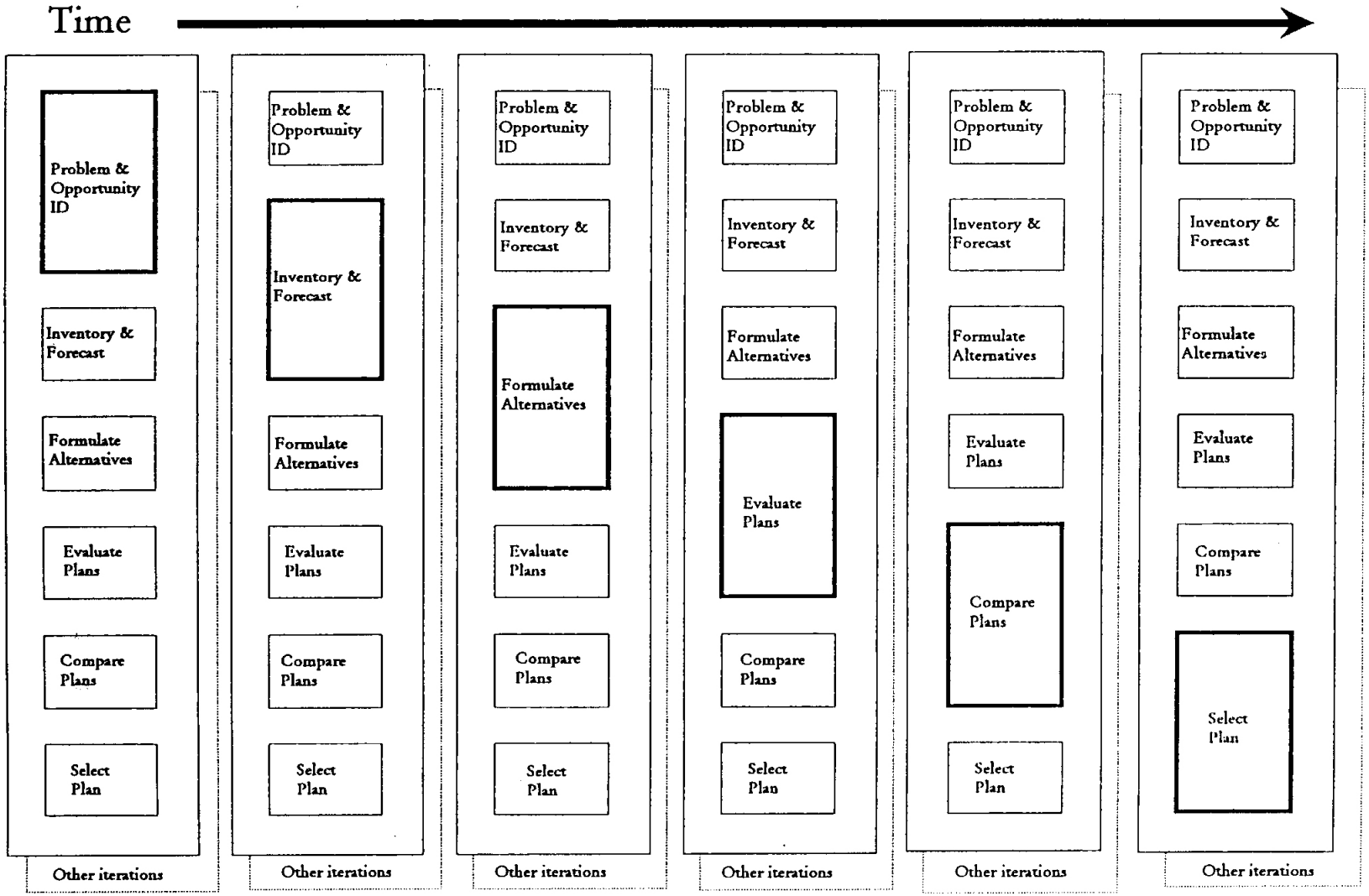


Planning Process

- You can do good planning quickly
- You do not need perfect information to do planning
- The planning process is a touchstone
- It is always possible to improve on plans
- You will always be wrong*

**there will always be more data to collect*

Figure 2: Corps' Planning Process



Step 1 Specify Problems and Opportunities

- ***Problems***: negative
- ***Opportunities***: positive
- Without a clear statement of the problems or the opportunities, there is no reason for planning

Step 1 Specify Problems and Opportunities

- Objectives are what you are working towards
- **Objective** = does good
- **Constraint** = don't do, can't do
- Objectives and constraints indicate what is important to people

Step 1 Planning Objectives

- To guide inventory data collection and forecasting
- Planning objectives are the bridge from problems to plans
- To guide evaluation of effects - reflect benefit categories
- Change in subsequent iterations of the planning steps

Step 2 Inventory and Forecast

- Much data can be collected
- Not all data provides important information
- Four conditions: historic, existing, with and without
- Forecasting assumption is most likely case
- A good without condition is essential to a good decision
- Inventory and forecast must be meaningful to the decision that is made

Step 3 Formulate Alternative Plans

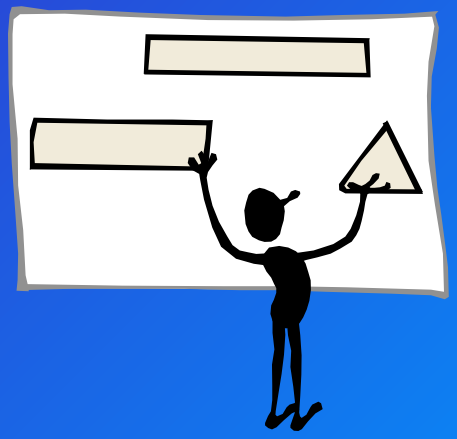
- Doing nothing is always the default action
- Any plan must be better than doing nothing
- ***Management Measure*** - feature or activity at a site
- ***Alternative Plan*** - one or more management measures
- Alternative plans must address one or more of the planning objectives

Step 4 Evaluation

- Looking at a plan on its own merits
- Forecast with project conditions
- Compare with and without conditions
- Describe effects
- Benefit-Cost analysis

Step 5 Comparison

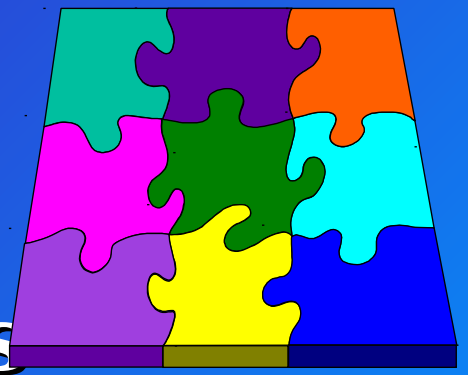
- Contrasting the merits among plans
- Comparing effects
- Describe differences
- Describe trade-offs



Formulation Criteria

Formulation criteria are used to determine when adequate iterations have been accomplished

- **Effectiveness**
- **Efficiency**
- **Completeness**
- **Acceptability**



Step 6 Selection

- Early iterations of the planning steps involve screening
- Decision makers can disagree on what is most important
- Different selection criteria will lead to different decisions
- Planners are advisors and not necessarily decision makers
- In the end, you may not get your way..

Further Information

- Don’t forget ER 1105-2-100 & ER 1110-2-1150
- IWR has published a Planning Manual and Planning Primer
- Ken Orth, South Pacific Division Chief of Planning has training class that covers the planning process

~~Planning Process~~

Discussion